Tax Professional: Client List – Search for Client

The **Client List** page allows you to view and manage your **Client List**. Your includes clients added through MyFTB, added with a Tax Information Authorization (TIA) form, and those added with a Power of Attorney (POA) Declaration submitted to FTB after October 1, 2014.

You can use the **Search Options** to view different client types, relationship types, or relationship statuses. To find specific clients, you can use the filter boxes on your **Client List**. You can filter your **Client List** by specific taxpayer information, such as the taxpayer or business name, ID number, and type relationship.

For information about other actions you can take on your **Client List** page, refer to:

- Power of Attorney (POA) – Check POA Status
- Tax Information Authorization (TIA) – Check TIA Status
- Power of Attorney (POA) – Submit Form 3520 (PIT or BE)
- Tax Information Authorization (TIA) – Add TIA Client

To search for POA or TIA clients on your Client List:

- Log in to your MyFTB Tax Professional account.
  - Once you're logged into MyFTB, if you need help with the page you're on, select the question mark icon "?" in the upper right corner of that page.
- View your **Client List**.
  - From your **Tax Professional Overview** page select:
    - **Client List** from your **Main Navigation Menu**, or
    - The **View Client List** link in your **Quick Links** section.
- Follow the steps below.

Steps

Step 1: Search by Client Type

- Select the type of client you want to search by in the **Search Options** section. By default, all active individual clients display on your **Client List**.
  - From the **Client Type** dropdown menu select (by default, **Individual** is selected):

        - Individual
        - Business
        - Fiduciary (Estate or Trust)
        - 540NR Nonresident Group Return

    Note: Fiduciary (Estate or Trust) and 540NR Nonresident Group Return client account information is not available online at this time. These clients will display on your **Client List** to allow you to manage the TIA relationship (renew or revoke). You can view notices sent to these clients in the last 60 days on your **Client Notices** page.

Step 2: Search by Relationship Type

- Select the type of relationship you want to search by in the **Search Options** section.
    - From the **Relationship Type** dropdown menu select (by default, **All** is selected):
        - All
        - TIA
        - POA

Step 3: Search by Relationship Status

- Select the relationship status you want to search by in the **Search Options** section.

  Note: For more information about relationship statuses, [refer to the Relationship Statuses section of this document].
    - From the **Relationship Status** dropdown menu select (by default, **Active** is selected):
        - Active
        - Pending
        - Inactive

Step 4: Search for Clients

- Select the **Search** button.

Step 5: Review Your Search Results

- Review your **Client List** in the **Search Results** section.
    - For **Individual** clients, select your client's **Last Name** link in the **Last Name** column to view their account.
    - For all other **Client Types** select the **Name** link in the **Name** column.

- If you are unable to locate your client on your **Client List**, continue to Step 6.

Step 6: Filter Your Client List

- To locate a specific client on your **Client List**, use the filter boxes at the top of each column.
  - For **Individual** clients, select your client's **Last Name** link in the **Last Name** column to view their account.
  - For all other **Client Types** select the **Name** link in the **Name** column.
- To apply a new filter, select the **Clear Filter** link above your **Client List** to clear all the filter boxes.
- If you are still unable to locate your client on your **Client List**, continue to Step 7.

Step 7: Unable to Locate Your Client

- If you are unable to locate your client on your **Client List**, change the Relationship Status, refer to Step 3 and select the **Search** button to search again.
- If you are still unable to locate your client, contact the Tax Practitioner Hotline, 916.845.7057.

Relationship Statuses

There may be more than one status for each **Relationship Status**: Active, Pending, and Inactive.

Relationship Statuses:

- Active statuses:
  - **Active** – You are authorized to access information or represent your client based on the authorizations granted on the POA declaration or TIA request.
- Pending statuses (you are not authorized to request information or represent the client based on a pending relationship):
  - **Pending** – POA declaration or TIA request was submitted through MyFTB or by mail and is being processed by FTB.
  - **Pending Taxpayer Approval** (POA **only**) – POA declaration was submitted through MyFTB without a signed copy of the POA declaration attached. FTB approved the POA declaration and it is pending approval by your client.

    Note: Advise your client they must log in to their MyFTB account and approve the POA declaration (if your client does not have a MyFTB account, advise them to contact FTB, 800.852.5711).

  - **Pending Relationship Verification** – FTB has approved the POA declaration or TIA request and has notified your client to contact us to approve the POA or TIA relationship.

    Note: Advise your client they must contact FTB and approve the relationship, 916.845.5525.

- Inactive statuses (you are not authorized to request information or represent the client based on an inactive relationship):
  - **Revoked** – Taxpayer or representative revoked the relationship.
  - **Rejected** – POA declaration or TIA request was deemed incomplete or invalid by FTB during processing.
  - **Expired** –Relationship has passed the expiration date.
  - **Canceled** – Relationship was processed by FTB and was canceled by the taxpayer before it became active.
  - **Revoked Permanent** (TIA **only**) – TIA relationship was permanently revoked by the taxpayer. Taxpayer must contact FTB if they want to have the relationship re-established.

  Note: Select **View Details** in the **Actions** column on your **Client List** to get additional information.